

California Department of Community Services and Development

2018 Cal EITC Education and Outreach Grant

BIDDERS CONFERENCE

Thursday, August 23, 2018



Presenters

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AGENDA

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- Overview of Department of Community Services and Development
- Earned Income Tax Credit (EITC) Background
- Purpose of the Notice of Funding Availability (NOFA)
- Targeting
- Education and Outreach Grant Activities
- Available Funding and Target Areas
- Grant Requirements
- Notice of Intent to Apply
- Application Package
- Review Process
- Projected Timeline
- Questions

Department of Community Services and Development (CSD)

Mission

CSD reduces poverty for Californians.

Vision

CSD leads the development and coordination of effective and innovative programs for low-income Californians.

-- Partners Against Poverty! --

www.csd.ca.gov

EITC Background

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- ▶ **Federal EITC:** Refundable cashback tax credit for low-to-moderate income working individuals and families earning \$53,930 per year or less. EITC reduces tax liability and then issues any unused credits as a cashback refund when a tax return is filed.
- ▶ **State EITC:** The California Earned Income Tax Credit (Cal EITC) supplements the federal EITC. Cal EITC helps working individuals and families earning less than \$22,322. A tax return must be filed to claim the credit.

Purpose of the Notice of Funding Availability (NOFA)

- ▶ Support Cal EITC education and outreach activities
 - ▶ Educational efforts should include federal EITC
- ▶ Support education and outreach for the Volunteer Income Tax Assistance (VITA) program
- ▶ Funding must support new or expansion activities.

Projected Timeline

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Activity	Date
NOFA Released	August 15, 2018
Bidders Conference	August 23, 2018
Deadline for Submitting Questions	August 24, 2018
Notice of Intent to Apply	August 24, 2018
Question & Answers Posted on CSD Public Website	August 28, 2018
Deadline for Submitting Applications	September 5, 2018
Notice of Awardees Posted	September 26, 2018
Contracts Sent to Awardees	October 1, 2018
Contract Due Back to CSD	October 9, 2018
Contract Term	October 15, 2018 – June 30, 2019

Targeting

Messaging

- 1) Availability of state EITC
- 2) Availability of federal EITC
- 3) Free Tax Preparation
- 4) Californians who have never claimed the EITC
- 5) Self-employed workers
- 6) Young adults ages 18 to 24 ***New 2018**
- 7) Seniors who are aged 65 and older ***New 2018**
- 8) Workers with incomes up to \$22,322
- 9) Californians whose low income does not require them to file taxes
- 10) Where to get more information

Education & Outreach Activities

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- ▶ Canvassing – required for Target Areas 1-13
- ▶ Web – required for Target Areas 1-15
- ▶ Social Media – required for Target Areas 1-15
- ▶ Media
- ▶ Collateral Messaging
- ▶ Group Events
- ▶ Others

Collateral Messaging

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Critical EITC and eligibility information is available through:

Franchise Tax Board

<https://www.ftb.ca.gov>

Internal Revenue Service

<https://www.eitc.irs.gov/>

CalEITC4Me

<http://caleitc4me.org>

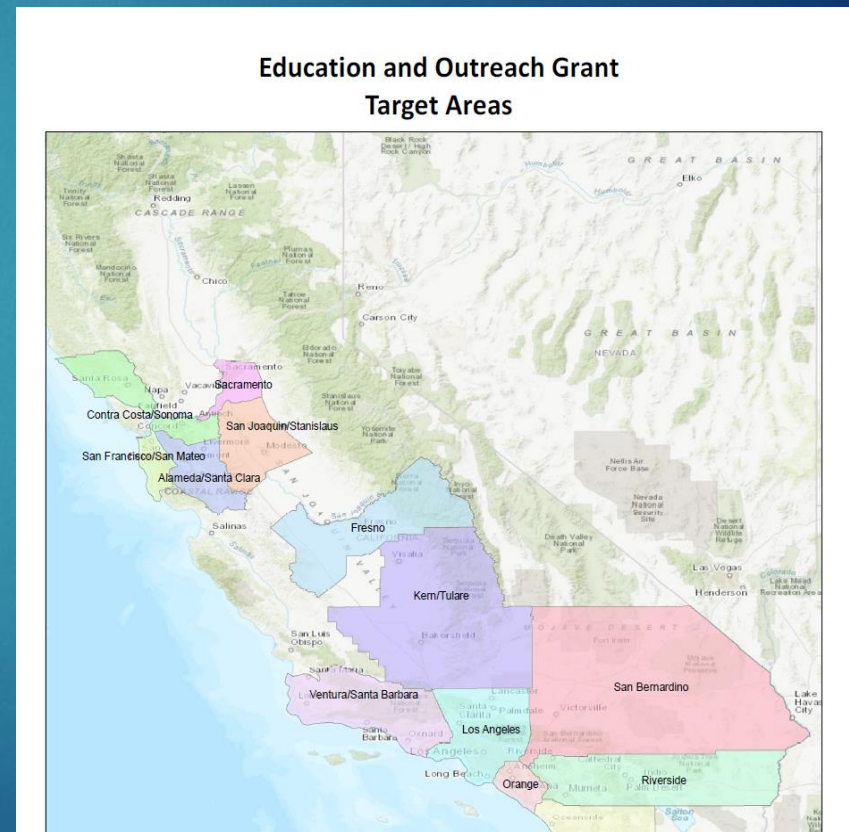
Targeting

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Geographic Area – areas identified as having the highest proportion of eligible California residents not claiming the credit.

► Target Areas 1 – 15

Regions	
1	Los Angeles County
2	San Diego County
3	Alameda/Santa Clara Counties
4	San Francisco/San Mateo Counties
5	Sacramento County
6	Riverside County
7	Orange County
8	Contra Costa/Sonoma Counties
9	San Bernardino County
10	Kern/Tulare Counties
11	San Joaquin/Stanislaus Counties
12	Fresno County
13	Ventura/Santa Barbara Counties
14	Rural
15	Statewide



Where in NOFA: Page 10 -13 and Appendix I. Maps of Target Areas 1-13

Target Area 14

Rural Counties

- ▶ Alpine
- ▶ Amador
- ▶ Butte
- ▶ Calaveras
- ▶ Colusa
- ▶ Del Norte
- ▶ El Dorado
- ▶ Glenn
- ▶ Humboldt
- ▶ Inyo
- ▶ Kings
- ▶ Lake
- ▶ Lassen
- ▶ Madera
- ▶ Mariposa
- ▶ Mendocino
- ▶ Modoc
- ▶ Mono
- ▶ Nevada
- ▶ Plumas
- ▶ San Benito
- ▶ Sierra
- ▶ Siskiyou
- ▶ Sutter
- ▶ Tehama
- ▶ Trinity
- ▶ Tuolumne
- ▶ Yuba

Target Area 15

Statewide Activities

- ▶ Hosting Mega Events
- ▶ Call Center Engagement
- ▶ Airing Public Service Announcements
- ▶ Administering Mini-Grants
- ▶ Statewide Technical Support for Grantees
- ▶ Scalable Infrastructure

Q & A

Target Areas 1-15

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Regions		2018 Allocation by Region	Total Awards	Contract Award
1	Los Angeles County	\$1,287,000	3	\$429,000
2	San Diego County	\$379,000	1	\$379,000
3	Alameda/Santa Clara Counties	\$364,000	1	\$364,000
4	San Francisco/San Mateo Counties	\$252,000	1	\$252,000
5	Sacramento County	\$233,000	1	\$233,000
6	Riverside County	\$226,000	1	\$226,000
7	Orange County	\$219,000	1	\$219,000
8	Contra Costa/Sonoma Counties	\$201,000	1	\$201,000
9	San Bernardino County	\$192,000	1	\$192,000
10	Kern/Tulare Counties	\$175,000	1	\$175,000
11	San Joaquin/Stanislaus Counties	\$165,000	1	\$165,000
12	Fresno County	\$153,000	1	\$153,000
13	Ventura/Santa Barbara Counties	\$114,000	1	\$114,000
14	Rural	\$220,000	2	\$110,000
15	Statewide	\$820,000	2	\$410,000
Total		\$5,000,000		

Applications

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- ▶ Applicants may apply for more than one target area.
- ▶ Applicants must submit a **separate** application for each target area to receive funding.

Inappropriate Use of Funds

- ▶ Funds cannot be used to supplant existing federal, state, or private funds
- ▶ Funds may not be used for any political or legislative advocacy work, nor to promote organizations, names, or etc. of grantees
- ▶ Costs are to be allocated for outreach and education activities only

Grant Requirements

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- ▶ Funds must be spent to providing EITC education and outreach to eligible California residents
- ▶ Grantees must target households with incomes at or below the tax filing limit
- ▶ Grant funds must support new EITC education and outreach activities or expand upon existing efforts
- ▶ Submit all Application Packet Documents (refer to Application Package Documents List)

Grant Requirements

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- ▶ Grantees must conduct activities and messaging at minimum in both English and Spanish
- ▶ Grantees must comply with programmatic and fiscal reporting
- ▶ Grantees must participate in coordination calls with CSD and awarded grantees
- ▶ Grantees must collaborate with each other and free tax preparation assistance programs to optimize education and outreach efforts

Grant Requirements

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- ▶ Grantees must collaborate with FTB by providing personally identifying data of individuals that were contacted during outreach efforts as well as information related to how these individuals were contacted.
- ▶ Grantees must possess insurance by the start of the contract term.

Eligibility Requirements

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- ▶ Tax exempt organization or local government entity including:
 - ▶ Private, non-profit or public organization
 - ▶ Local government agency (state agencies are ineligible for funding)
 - ▶ Federally recognized Indian Tribal Government
- ▶ Eligible to receive public funds (<https://www.sam.gov>)
- ▶ Be in good standing with federal and state administering grant issuing agencies

Minimum Qualifications

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Applicants must demonstrate:

- ▶ Knowledge of the CalEITC and free tax preparation assistance program;
- ▶ Three (3) years of experience successfully providing, coordinating and implementing education and outreach activities that serve low-income populations;
- ▶ Established and trusted relationships with community partners serving low-income populations, preferably with partners who have extensive EITC and tax preparation experience;

Minimum Qualifications

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Applicants must demonstrate:

- ▶ Capacity to implement and deliver all elements of the proposed activities described in the narrative response to this application;
- ▶ Ability to provide education and outreach activities appropriate to the language and culture of the targeted population; and
- ▶ Ability to collect and report reliable, valid, and timely data monthly for all proposed activities.

Q & A



Department of Community Services and Development

2018 Notice of Intent to Apply

Instructions: Submit this Notice of Intent to Apply via mail, in-person delivery or email, **no later than 5:00 p.m. on August 24, 2018**. Applicants wishing to make their Notice of Intent to Apply public for collaboration may do so by indicating below. The public list will be posted and updated periodically to the CSD public website at www.csd.ca.gov

Submit by mail or deliver in-person to: Department of Community Services and Development Attn: Program Development Unit, 2018 Cal EITC NOFA 2389 Gateway Oaks Drive, Ste. 100 Sacramento, CA 95833	
Submit by email to: CSBGDIV@CSD.CA.GOV	
Use the following subject line: 2018 Cal EITC NOFA	
Organization	
Address:	
City:	Zip Code:
Phone:	
Email:	
Target Area(s): (Check all target areas you plan to apply for)	<input type="checkbox"/> Target Area 1: Los Angeles <input type="checkbox"/> Target Area 2: San Diego <input type="checkbox"/> Target Area 3: Alameda/Santa Clara <input type="checkbox"/> Target Area 4: San Francisco/ San Mateo <input type="checkbox"/> Target Area 5: Sacramento <input type="checkbox"/> Target Area 6: Riverside <input type="checkbox"/> Target Area 7: Orange <input type="checkbox"/> Target Area 8: Contra Costa/Sonoma <input type="checkbox"/> Target Area 9: San Bernardino <input type="checkbox"/> Target Area 10: Kern/Tulare <input type="checkbox"/> Target Area 11: San Joaquin/ Stanislaus <input type="checkbox"/> Target Area 12: Fresno <input type="checkbox"/> Target Area 13: Ventura/ Santa Barbara <input type="checkbox"/> Target Area 14: Rural <input type="checkbox"/> Target Area 15: Statewide <input type="checkbox"/> Target Area 15: Statewide
Signature of Designated Person (Executive Director or Chief Executive Officer)	
Print Name and Title:	
Publicly Disclose?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Notice of Intent to Apply

Application Package

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Stack Order	Document Title
N/A	Application Packet Instructions and Document List *NOTE (do not return with application)
1	Application Cover Sheet (CSD 171 Cover Sheet)
2	Application Narrative Template (CSD 171ANT)
3	Scope of Work (CSD 171)
4	Budget Forms <ul style="list-style-type: none">• Budget Summary (CSD 171A)• Budget Detail (CSD 171B)
5	Timeline (CSD 171TL)
6	Two letters of Reference
7	Subcontractor Information Worksheet (CSD 171SI)
8	Payee Data Record (STD 204)
9	Contractor Certification Clauses Form (CCC-04/2017)

Where in NOFA: Pages 16-17

State of California
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
Cal EITC Outreach and Education Application Cover Sheet
CSD 171CoverSheet (Rev. 7/2018)

2018 Cal EITC Education and Outreach Grant Application Cover Sheet

Note: The cover sheet is not scored but is a required element of the application.

APPLICANT INFORMATION	
APPLICANT NAME:	
FUNDING AMOUNT REQUESTED:	\$
TARGET AREA:	
TYPE OF TAX EXEMPT ENTITY:	
<input type="checkbox"/> PRIVATE NON-PROFIT	
<input type="checkbox"/> LOCAL PUBLIC ENTITY (STATE AGENCIES INELIGIBLE)	
<input type="checkbox"/> FEDERALLY RECOGNIZED INDIAN TRIBAL GOVERNMENT	
TAX PAYER ID #:	
MAILING ADDRESS:	
NAME OF EXECUTIVE DIRECTOR / CHIEF EXECUTIVE OFFICER:	
PHONE NUMBER:	
EMAIL ADDRESS:	
POINT OF CONTACT NAME:	
PHONE NUMBER:	
EMAIL ADDRESS:	
APPLICANT CERTIFICATION	
"I certify by my signature below that my organization possesses ALL of the following":	
A. Knowledge of the state and federal Earned Income Tax Credit (EITC) and Free Tax Preparation Assistance programs;	
B. Three (3) years of experience successfully providing, coordinating, and implementing education and outreach activities that serve low-income populations;	
C. The ability to provide education and outreach activities appropriate to the language and culture of the targeted population;	
D. The ability to collect and report reliable and valid data for all proposed activities; and	
E. Entity is in good standing with federal and state administering grant issuing agencies.	
AUTHORIZED INDIVIDUAL'S NAME, TITLE, & SIGNATURE	NAME:
	TITLE:
	WRITTEN SIGNATURE:
	DATE:

Application Cover Sheet

Scored Documents

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Document Title	Subtitle	Total Possible Points
Application Narrative Template (CSD171 ANT) (55 possible)	Education and Outreach	20
	Organizational Capacity	25
	Trusted Partners and Leveraging	10
Preference Points (10 possible)	Past Activities Conducting EITC Education and Outreach	5
	Languages (other than English and Spanish)	5
Scope of Work (CSD 171)		45
Total Points Possible		110

Application Narrative Template (CSD 171ANT)

- Education and Outreach (20 Points)
- Organizational Capacity (25 Points)
- Trusted Community Partners and Leveraging (10 Points)
- Past EITC Activities (5 Preference Points)
- Languages (5 Preference Points)

**2018 Cal EITC Education and Outreach Grant Application
Narrative Template**

**EXPERIENCE CONDUCTING EDUCATION AND OUTREACH
(20 POINTS)**

NOTE: 20 Page max limit begins from this page forward

Use this section to present a detailed description of your organization's experience.

Applicant Must Include the Following:

- | |
|--|
| a) Experience conducting similar education and outreach activities to low-income individuals and families in the specified Target Area for which you are applying. A minimum of three years of experience is required; |
| b) Past education and outreach campaigns conducted in the proposed target area in appropriate languages; and |
| c) Operational readiness and expertise in conducting, budgeting, and implementing similar scale education and outreach activities. |

Experience Conducting Education and Outreach (20 Points)

**ORGANIZATIONAL CAPACITY FOR CALEITC
EDUCATION AND OUTREACH ACTIVITIES (25 POINTS)**

Applicant Must Include the Following:

- | |
|--|
| a) The geographic area(s) to be targeted, including: <ul style="list-style-type: none"> • county • zip code • city/neighborhood (if available) • rural or urban • other identifying targeting information |
| b) The service delivery strategy to be used to deliver education and outreach activities. Emphasis should be given to those strategies with the greatest amount of person to person and targeted interventions. Targeted interventions for example may include grantees collaborating with public agencies and community-based organizations to reach eligible individuals and families receiving public benefits such as CalWORKs, Cal Fresh or Medi-Cal. |
| c) Why the type(s) of outreach chosen is/are determined to be the most effective method for reaching the proposed area/population to be served. |
| d) Efforts to ensure proposed education and outreach activities are reaching: <ul style="list-style-type: none"> • Culturally diverse low-income eligible populations in multiple languages • Young adults ages 18-24 • Seniors ages 65 and older • Self-employed workers • Workers with incomes up to \$22,322 that are; • Individuals and families whose low income does not require them to file taxes • Californians who have never claimed the EITC, regardless of whether filed taxes previously. |
| e) Expertise, staffing, partnerships, etc. that will help in the delivery of the proposed activities with a specific emphasis on partnerships that will assist in reaching those that are not required to file taxes, self-employed, individuals 18 to 24 years, and individuals over 65 years. |
| f) Activities designed to help connect people with local free tax preparation assistance sites and/or other resources (e.g. https://www.etc.irs.gov), making it convenient, easy, and accessible for people to claim the credit. Free tax preparation assistance activities could include setting appointments, providing referrals, making follow-up calls, etc. |

Organizational Capacity (25 Points)

TRUSTED COMMUNITY PARTNERS (10 POINTS)

Use this table to present detailed information on trusted community partners to be engaged who will help deliver successful education and outreach activities. Community partners differ from subcontractors in that, for this NOFA, they are unfunded, collaborative, and community-based organizations that have a positive, past working relationship with applicants. Applicants should detail efforts involving public benefits agencies as well as public and private faith-based, schools, social services program, veteran, and disability entities. Rows may be added/deleted as necessary.

Required Content:	
•	Names and location of community partner(s) to be engaged;
•	Purpose of the community partner;
•	Description of how the partner will help the applicant achieve the projected outcomes identified in the Scope of Work (CSD 171).
•	Efforts involving coordinating with public benefits agencies as well as public and private faith-based, school, social services program, veteran, and disability entities

[illegible]

Trusted Community Partners (10 Points)

PAST ACTIVITIES CONDUCTING EITC EDUCATION AND OUTREACH (5 PREFERENCE POINTS)

If your organization has experience conducting EITC specific education and outreach, including the VITA program, you must provide data (i.e., number of people reached, number of outreach events held, etc.) on past accomplishments demonstrating success spanning 1-3 years.¹ Include data on past accomplishments using the table provided for each calendar year. If you did not conduct outreach under any of the provided activities, write "N/A".

EITC Outreach Type	Activity Detail	Past Calendar Years Performance Outcomes		
		2016	2017	2018
Web				
Social Media				
Canvassing				
Media				
Collateral Messaging				
Group Events				
Other				

Past Activities Conducting Education and Outreach (5 Preference Points)

**LANGUAGES OTHER THAN ENGLISH AND SPANISH
(5 PREFERENCE POINTS)**

Use this section to present a detailed description of what outreach activities will be conducted in languages other than English and Spanish.

Enter narrative response here:

Delete this text and type narrative (Text box will expand as narrative is entered)

Languages
other than
English and
Spanish
(5 Preference
Points)

Application Narrative Template

LANGUAGES OTHER THAN ENGLISH AND SPANISH (5 PREFERENCE POINTS)

Use this section to present a detailed description of what outreach activities will be conducted in languages other than English and Spanish.

Enter narrative response here (Text box will expand as narrative is entered)

Delete this text and type narrative

Q & A

Scope of Work

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- ▶ No page limit
- ▶ Use whole numbers for the Projections
- ▶ Indicate “n/a” if not conducting that particular activity
- ▶ Follow the definitions and instructions indicated in the “Scope of Work Instructions” tab

Scope of Work

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State of California

DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

2018 CalEITC Education and Outreach Scope of Work

CSD 171 (Rev. 7/2018)

2018 CALEITC EDUCATION AND OUTREACH GRANT SCOPE OF WORK

Organization Name:		Representative	
Telephone Number:		Email Address:	

Target Area (County):	
Requested Amount:	

Projected CalEITC Education and Outreach Grant Activities

Purpose: Below is a summary over the life of the grant of various education and outreach activities to be performed. Enter the metrics for each category and then detail the activities to be conducted. Refer to the "Scope of Work Instructions" for definitions and instructions of each category and how to interpret what each projection metric represents.

Outreach Activity	Category	Projected Number
Web	EITC Website Hits	
Description of Activities to be Conducted		

Web - Definitions and Instructions

EITC Website Hits: Provide number of visits to a web page fully dedicated to Cal EITC. Note this is not website hits to organization's main page.

Description of Activities To Be Conducted This narrative must cover the following (in this order):

- 1) Summary of updates that will be made to the website during the life of the grant.
- 2) A listing of website updates that that will occur, who they will target, and where.
- 3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."
- 4) Any other additional information pertinent to work that will be conducted in relation to web presence. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).

Scope of Work

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Outreach Activity	Category	Projected Number
Social Media	Facebook Posts	
	Twitter Posts	
	Other Posts (Instagram, etc.)	
Description of Activities to be Conducted		
Social Media - Definitions and Instructions		
<p>Number of Facebook, Twitter, Other Posts: Provide the total number of social media posts to be conducted during the life of the grant.</p> <p>Description of Activities To Be Conducted: This narrative must cover the following (in this order):</p> <ol style="list-style-type: none">1) Detail the various avenues through which you will conduct social media posts, including which platform(s) (Facebook, Twitter, Instagram, etc.). Explain how you will accurately determine which messaging will resonate with eligible Californians, including adoption of messaging created by statewide grantees2) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."3) Indicate leveraging of other resources in regards to social media. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).		

Scope of Work

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Outreach Activity	Category	Projected Number of Interactions
Canvassing	Canvassing in Targeted Zip Codes	
	New Contacts to Receive Text Messages	
	Phone Calls	

Description of Activities to be Conducted

Canvassing - Definitions and Instructions

Interactions: Provide the total number of conversations that will take place over the life of the grant. Note that these are interactions, not individuals reached. For example, if while canvassing the canvasser speaks to more than one household resident, this is counted as "1" interaction. Indicate total number of interactions here.

Number of Individuals who Receive Targeted Text Messages: Provide the number of individuals that will be reached using targeted text messaging. For example, you send out two texts to the same group of 50,000 people. You would enter "50,000" people into this cell. Indicate total number of texts here.

Description of Activities To Be Conducted: This narrative must cover the following (in this order):

- 1) Provide details of canvassing expected for the targeted zip codes in the target area. Outline by zip-code, providing projected metrics for each targeted zip-code indicated in *Appendix I: Maps of Target Areas 1-11*
- 2) Provide details of canvassing for non-targeted zip codes and specifically why canvassing needed there. A full listing of all zip-codes not necessary here.
- 3) Please detail the various messaging for the texts that will be sent out during the life of the grant. Also provide detail on how the numbers will be procured in order to send the texts.
- 4) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."
- 5) Any other additional information pertinent to work that will be conducted during the life of the grant in relation to canvassing, including indicating any leveraging of other resources conducted this month. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).

Scope of Work

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Outreach Activity	Category	Projected Number of Impressions
Media	Printed Ads	
	Paid Radio Ads	
	Radio PSAs	
	Paid Television Ads	
	Television PSAs	
	Billboards	
	Transit Ads	
	Impressions from Internet/Website Ads	
	Impressions from Social Media Promoted/Boosted Ads	

Description of Activities to be Conducted

Media - Definitions and Instructions

Impressions Definition: Calculated impressions based on total unique visits/views per month. In other words, what is the estimated unduplicated count of the particular media outreach for the life of the grant? For example, a transit ad may run for four weeks during a month and have a reach of 80,000. Realistically, however, the same people view that ad every week, so the impressions from that transit ad are realistically 20,000. Another example is that a radio ad is played on a station with a reach of 1,500,000 people a month. The radio ad which ran only twenty times that month, however, has a more realistic impression of 50,000. Most vendors will provide these realistic impressions as part of agreement with grantee.

Impressions of Printed, Paid Radio, Radio PSAs, Paid T.V. Ads, Television PSAs, Billboards, Transit, Internet/Website, and Social Media/Boosted Ads: Indicate number of projected impressions for the various ads. Indicate total number of impressions here.

Description of Activities To Be Conducted This narrative must cover the following (in this order):

1) For each type of advertisement, please detail why it would be effective in the indicated target area and how ads will be managed. In regards to each type of ad, indicated how applicants will provide CSD monthly a breakdown of each advertisement's impressions.

2) Provide details for any local press event(s) expected and whether applicant will seek to obtain print/online, radio, or television coverage of the event(s).

3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."

4) Indicate leveraging of other resources in regards to media. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).

Scope of Work

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Outreach Activity	Category	Projected Number
Collateral Messaging	Flyers/Brochures Distributed	
	Individuals who Receive Direct Mailers	
	Individuals who Receive Targeted Emails	
Description of Activities to be Conducted		
Collateral Messaging - Definitions and Instructions		
<p>Flyers/Brochures Distributed: Provide the total number of brochures/flyers that will make their way to eligible Californians. This may include, but is not limited to: distributing flyers at the end of an event, flyers distributed to people who enter a career-center, brochures disseminated to school children to bring home to their parents, etc. Do not include, however, brochures distributed to partners or left at places like coffee shops. Please detail those efforts in the narrative, but do not add them as a projection.</p> <p>Number of new Individuals who Receive Targeted Emails: Provide the number of new emails that were sent that contains information about CalEITC.</p> <p>Number of Individuals who Receive Direct Mailers: Provide the number people who will receive a direct mailer. Indicate total number of direct mailers here.</p> <p>Description of Activities to be Conducted - This narrative must cover the following (in this order):</p> <ol style="list-style-type: none"> 1) Broad overview of flyer/brochure distribution, including leveraging of any resources. Overview should match metrics listed above. 2) Listing of direct mailers that will be sent out. Overview should match total listed above. 3) Provide details about each expected newsletter and how it will reach eligible Californians. 4) Indicate which languages will be utilized. For example: "English, Spanish, Chinese, Russian, etc." 5) Any other additional information pertinent to work conducted during the month in relation to complimentary messaging, including indicating any leveraging of other resources. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet). 		

Scope of Work

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Outreach Activity	Category	Projection (#)
Group Events	Number of Events	
Description of Activities To Be Conducted		
Type Text here		
Group Events - Definitions and Instructions		
<p>Number of Events: Provide the total number of Group Events that will take place.</p> <p>Description of Activities To Be Conducted - This narrative must cover the following (in this order):</p> <ol style="list-style-type: none">1) Provide details of group events expected for the targeted zip codes in the target area. Outline by zip-code, providing projected metrics for each targeted zip-code indicated in Appendix I: Maps of Target Areas 1-11.2) Provide details of group events for non-targeted zip codes and specifically why group events needed there. A full listing of all zip-codes not necessary here.3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."4) Any other additional information pertinent to work conducted during the month in relation to group events, including indicating any leveraging of other resources. This includes referencing subcontractors listed under the CSD 171SI (Subcontractor Information Worksheet).		

Scope of Work

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Outreach Activity	Category	Projection (#)
Other 1		
Description of Activities To Be Conducted		
Type Text here		
Other 2		
Description of Activities To Be Conducted		
Type Text here		
Other 1 - Definitions and Instructions		
<p>Directions: Provide clear and concise definitions for outreach activity "other."</p> <p>Outreach Activity "Other 1" Name:</p> <p>Outreach Activity "Other 1" Category:</p> <p>Catgory Projection Definition:</p> <p>Definition of "Description of Activities To Be Conducted" (Provide order to match narrative in Scope of Work)</p> <p>1)</p> <p>2)</p> <p>3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."</p>		
Other 2 - Definitions and Instructions		
<p>Directions: Provide clear and concise definitions for outreach activity "other."</p> <p>Outreach Activity "Other 1" Name:</p> <p>Outreach Activity "Other 1" Category:</p> <p>Catgory Projection Definition:</p> <p>Definition of "Description of Activities To Be Conducted" (Provide order to match narrative in Scope of Work)</p> <p>1)</p> <p>2)</p> <p>3) Indicate what languages will be utilized. For example: "English, Spanish, Chinese, Russian."</p>		

Budget Summary

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State of California
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
Cal EITC Outreach and Education Budget Summary
CSD 171A (Rev. 07/12/17)

CAL EITC EDUCATION AND OUTREACH CONTRACT BUDGET SUMMARY

Organization Name:	Example Organization	Representative:	John Doe
Telephone #:	(55) 555-5555	E-mail Address:	john.doe@example.org
Target Area (County):		6-Sacramento	
Requested Amount:		\$90,000.00	
Education and Outreach Activities			
Line Item		Projected Expenditures (rounded to the nearest dollar)	
1	Web		
2	Social Media		
3	Canvassing		
4	Media		
5	Collateral Messaging		
6	Group Events		
7	Other 1:		
8	Other 2:		
Total Budget Amount (Sum of Line Items 1-8)			
Note: Total Must Match Requested Amount			

Budget Detail

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State of California
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
CAL EITC Education and Outreach Budget Detail
CSD 171B (Rev. 07/12/17)

CAL EITC EDUCATION AND OUTREACH BUDGET DETAIL

Organization Name:	Example Organization	Representative:	John Doe	
Telephone #:	(555) 555-5555	Email Address:	john.doe@example.org	
Target Area (County):		6-Sacramento		
Requested Amount:		\$90,000.00		
Education and Outreach Activities				
Note: Add/delete rows as needed to the bottom of each activity expenditure category.				
Activity - Expenditure	Detail	Cost	New or Expansion	Explanation
Web				
Example: Web Posting	Design and implementation	\$3,000	New	
Example: Website development	Web banners design (\$100/hour x 40 hours)	\$4,000	Expansion	Previously funded through campaign contributions; funding no longer available

CSD 171A Total: (AutoPopulate)		\$7,000	Leave This Cell Blank
Cannot Exceed Requested Amount		\$90,000	

Timeline

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State of California
DEPARTMENT OF
COMMUNITY SERVICES AND
DEVELOPMENT
CalEITC Education and Outreach
Grant Timeline
CSD 171TL (Rev.
7/2018)

Organization Name	0
Target Area (County):	0

2018 CALEITC EDUCATION AND OUTREACH GRANT TIMELINE

Use this Timeline to include a brief description of Education and Outreach activities to be completed in the corresponding month. Activities must correspond to activities indicated in the Scope of Work (CSD 171). You may add or delete extra space to each column and/or row, as needed.

Outreach Activity	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19
Web								
Social Media								
Canvassing								
Media								
Collateral Messaging								
Group Events								
Other 1:								
Other 2:								

Subcontractor Information

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State of California		Organization Name	0
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT		Target Area	0
CALEITC Education and Outreach Grant Subcontractor Information		Requested Amount	\$0.00
CSD 171SI (Rev. 7/2018)			

2018 CALEITC Education and Outreach Grant Subcontractor Information Worksheet

Subcontractor Information Worksheet is not scored but is a required element of the application.

Use this spreadsheet to provide information on each planned subcontract. The use of any planned subcontractor(s) must be fully disclosed and explained here. Awarded applicants will be expected to update this spreadsheet with funding amounts. Selected applicants and their subcontractors are subject to all state laws and regulations. Applicants may expand rows on this worksheet if more room is needed per planned subcontractor.

Organization	Contact Name	Brief Description of Activities

Contractor Certification Clauses

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CCC 04/2017

CERTIFICATION

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor to the clause(s) listed below. This certification is made under the laws of the State of California.

<i>Contractor/Bidder Firm Name (Printed)</i>		<i>Federal ID Number</i>
<i>By (Authorized Signature)</i>		
<i>Printed Name and Title of Person Signing</i>		
<i>Date Executed</i>	<i>Executed in the County of</i>	

Q & A

Review Process

Application Pass/Fail Review

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- ▶ One (1) original single-sided application package plus four (4) exact copies (Use a paper or binder clip to bind each of the packets – do not staple any parts of the application or attachments);
- ▶ Flash Drive with an electronic copy of all application documents (in PDF format) is submitted;
- ▶ The requested funding is within the funding limits;
- ▶ All application documents from the table above (1-9) have been completed and included with the application;
- ▶ Every document includes full contact information and applicable signatures; and
- ▶ Late applications will be rejected and will not be considered for funding.

Review Process

Proposal Elements Evaluation

- ▶ The Evaluation Team will use a consensus scoring methodology, where one score is awarded per the team's collective assessment.
- ▶ Applications will be scored against each other in each of the 15 Target Areas. For example, Target Area 1 (Los Angeles) applicants will be evaluated against other applications applying for funding in Los Angeles only.
- ▶ The scores from each subsection will be added to determine the preliminary total score.

Questions

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Two Ways to Submit Additional Questions:

- ▶ Captured and recorded today on the webinar
- ▶ Email questions to CSBGDIV@csd.ca.gov using the subject line: Questions on 2018 NOFA EITC

All questions and answers will be posted to the CSD website <http://www.csd.ca.gov/Resources/ContractingOpportunities.aspx> on August 28th.

Q & A

Thank You!